



**Let's start the adventure of  
reaching your life goals,  
strengthening your human and  
financial capital for your family  
and your business.**

**elaine king**  
FAMILY AND MONEY MATTERS™

Family Governance | Financial Education | Wealth Planning





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**I can not wait to start saving  
and investing more in my  
future thanks to Elaine’s  
financial well-being workshop.  
Her strategies will help build a  
better world.”**

**FRANCISCO R.**  
CEO, Fortune 500 Company



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**I never thought I could  
take control of my finances,  
but it was all possible thanks  
to Elaine’s detailed advice,  
I was also able to improve my  
relationship with my family.”**

**CAROLA S.**  
Ph.D. Medical Research

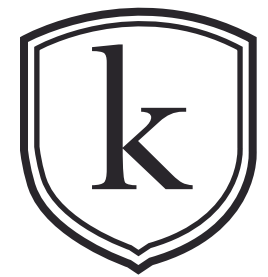




# KING FAMILY CONSULTING

## FAMILY FINANCIAL GOVERNANCE

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We work using a unique methodology to strengthen the alignment of your human (family) and financial (business) capital. In this process, we go through seven pillars; decision-making process models, communication strategies, value creation, social impact code, financial education, and legacy planning with multigenerational structures and policies for the business and family office. For this process we have a special program:



### **RETURN ON MISSION (ROM)<sup>™</sup>**

Return on Mission (ROM)<sup>™</sup> it helps evaluate each member of the family and their role and creates a plan to strengthen the seven pillars as a family unit. This plan will define key roles and responsibilities for your future stakeholders, and create a strong foundation for your family legacy.





# FAMILY AND MONEY MATTERS™ INSTITUTE



## FAMILY FINANCIAL EDUCATIONAL PROGRAMS

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Dedicated 100% to the family learning together. We offer key workshops and transformative programs for couples, young adults, financial advisors, and social catalysts. For this process we have a dedicated program:



### RETURN ON FINANCIAL IQ (ROF)™

Return on Financial IQ (ROF)™ it helps create a plan for your stakeholders so they can improve their financial wellbeing and be more productive. We measure your team's progress with seven financial wellbeing indicators and metrics. Key leaders are eligible to serve as your company's ambassadors and develop your own financial wellbeing corporate culture.





# KING GLOBAL INVESTMENTS: FAMILY WEALTH PLANNING

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We design a financial strategic plan that will include; an investment policy statement, balance sheets, cash flows, succession planning, family distributions, and net worth. For this process we have a special program:



## RETURN ON WORTH (ROW)<sup>™</sup>

Return on Worth (ROW)<sup>™</sup> it helps align your life purpose with seven key fundamental branches. We create an actionable plan to help you achieve your growth goals faster. Finally, we design a map, the best route and go step by step so that your financial adventure features fewer bumps, smoother roads, and lots of celebrations.





## ELAINE KING

Has worked with more than 1,200 families creating practical and actionable strategies focused on wealth planning, financial education, succession planning, social impact, and family governance.

Elaine has an advanced certificate on Family Business Advising (ACFBA) and is a certified financial planner™ professional (CFP®) considered an expert in international family finances and is an ambassador of the CFP® board. She is the founder and president of Family and Money Matters™ since 2012 whose mission is to empower the family's human and financial capital to reach financial wellbeing.

She is the author of six published books about financial planning two of them “Family and Money Matters Next Gen” and “La familia y el Dinero Hecho Facil” which were awarded the Best Latino Book Award. She is also the author of “Saltarín”, a children's book pioneering in teaching kids the value of financial planning.



# elaine king

FAMILY AND MONEY MATTERS™

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